

MiScorecard Performance Summary								
Business Unit:		Department of Treasury		Green		>=90% of target		
Executive/Director Name:		Nick Khouri		Yellow		>= 75% - 90% of target		
Reporting Period:		Oct 2018		Red		<75% of target		
				Date Approved:		11/14/2018		
Metric ID	Metric	Status	Progress	Target	Current	Previous	Frequency	Metric Definition
Customer/Constituent								
COLL-6	Customer Service - First Contact Resolution Rate (Contractor)- % of Calls Resolved on First Contact	Yellow		95%	77% 2018, September	82%	Monthly	The third-party collections contractor has a contractual target to provide debtors with contact resolution at the point of first contact. Contact Resolution is defined as the reasonable attempt to resolve 'an immediate' account issue through education and/or some action. The primary goal is to increase the overall percentage of first contact resolution for sampled calls. In an effort to increase customer service throughout the Collection Services Bureau, it is important that the third-party collections contractor is able to provide helpful and accurate information to taxpayers. A higher percentage rate means that more taxpayers were able to be assisted correctly during their first contact with our third-party contractors. Data has a lag time of 1 month.
TPB-10	IIT - Individual Income Tax Returns - % processed in same year as received.	Green		90.0%	106.4% 2018, October	104.8%	Monthly	Individual Income Tax (IIT) has a goal of processing all income tax returns in the year they are filed. Processing all returns provides better customer service and reduces phone calls and correspondence. A higher percentage represents (more) returns processed year to date.
TPB-15	IIT - Individual Income Tax Correspondence processed timely.	Green		90%	92% 2018, October	93%	Monthly	Individual Income Tax (IIT) has a goal of processing all correspondence within 60 days of receipt. Processing correspondence in a timely manner cuts down on phone calls and provides a better customer experience.
TPB-17	SUW - Sales, Use and Withholding Phone call average speed of answer.	Green		7.00	7.01 2018, October	6.30	Monthly	Answering phone calls within 7 minutes or less improves customer satisfaction as callers questions are answered in a timely manner.
TPB-20	SUW - Sales, Use and Withholding Correspondence processed timely.	Green		90%	93% 2018, October	91%	Monthly	Processing correspondence with 60 days of being received will result in accurate billings and refunds issued in a timely matter. This improves customer satisfaction as taxpayers are notified of the outcome of their correspondence in a timely manner. In addition, financial records and forecasting for the state are more accurate when correspondence is resolved in a timely manner.
TAXPOL-16	RABs - # of RABs issued annually	Green		10	10 (CY2017) 2017, CY	8 (CY2016)	CY Annually	Tax Policy Division is responsible for providing guidance on tax issues to the public (taxpayers, tax practitioners, etc.). Revenue Administrative Bulletins (RABs) are guidance issued by the Bureau of Tax Policy. This metric measures the number of RABs issued annually. A higher number represents overall improvement in providing tax guidance to the public. For purposes of this metric, RABs that update interest rates, tax rates, and education and community foundation certification are excluded.
Internal Business Process								
TCBMSP-1	Inspections of Tobacco Retailers	Green		470	1246 2018, CYQ3	1146	Quarterly	This measures the number of administrative inspections of tobacco retailers and licensees by MSP and Treasury enforcement personnel each quarter.
TCB - 3	Average Days to Complete a PA3 Audit with no taxpayer-requested Waiver or Request for Reconsideration - # Days	Green		200	186 2018, October	209	Monthly	An average of the days to complete a PA3 audit (Field Audit and Audit Processing) for audits completed in the month, where the taxpayer has not requested an extension of time (Waiver or Request for Reconsideration). Monitoring the Average Days to Complete helps to ensure that TCB provides each taxpayer with the best customer service possible. Efficient and timely completion of an audit helps to minimize the impact of the audit process on the taxpayer. Efficient use of time by the audit staff will also lead to the identification of more instances of non-compliance which in turn will level the playing field for all taxpayers. The measurement starts when the auditor begins the audit and ends when the Final Audit Determination letter (FAD) is issued to the taxpayer.
TCB-9	Average Days In Progress (DIP) for field work across all audit assignments, sent to TCB Processing - # Days	Green		200	204 2018, October	205	Monthly	A 12 month rolling average of the number of days audit assignments are in progress (DIP) will be measured and monitored to ensure that TCB Field Staff completes audits in a timely manner. The measurement starts when the auditor begins the audit and ends when the Preliminary Audit Determination letter (PAD) is issued to the taxpayer.
TCB-12	Average days to process an audit for all audits where processing has been completed - # Days	Green		100	73 2018, October	77	Monthly	A 12 month rolling average of the number of days to process an audit will be measured and monitored to ensure that audits are processed in a timeframe less than the requirement of PA3 of 2014. The measurement starts when the audit is sent to TCB Processing and ends when the Final Audit Determination letter (FAD) is issued to the taxpayer.
TCB-16	Average Quality Assurance (QA) score of randomly selected field audits sent to TCB Processing in the previous month - % Quality Score	Green		95%	95% 2018, September	96%	Monthly	An average of the monthly quality assurance (QA) review scores of randomly selected field audits sent to TCB Processing will be measured to ensure that procedures and policies are consistently followed in the audit process. Scores will be used to identify areas of miscommunication, so management can determine what type of training and/or guidance is needed to improve compliance. Data has a lag time of one month.
TCB-22	Suspicious filer correspondence processed within 60 days of receipt - % Processed	Green		95%	100% 2018, October	97%	Monthly	Percent of suspicious filer correspondence completed within 60 days of receipt. The purpose of this metric is to strive for strong taxpayer customer service by completing correspondence and releasing tax returns for normal processing quickly. Success in this metric reduces taxpayer phone calls, hardship request and improves the relationship between taxpayers and the department.
TCB-23	IRS correspondence processed within 60 days of receipt - % Processed	Green		95%	95% 2018, October	100%	Monthly	Percent of IRS correspondence completed within 60 days of receipt. The purpose of this metric is to strive for strong taxpayer customer service by completing correspondence and reviewing tax returns for prior years. Internal success in this metric reduces taxpayer phone calls for the unit and call center, and improves the relationship between taxpayers and the department.

TCB-24	Discovery correspondence processed within 30 days of receipt - % Processed	Green		95%	96% 2018, October	95%	Monthly	The percentage of correspondence completed within 30 days of receipt ensures a speedy response and improves taxpayer service.
BDG-4	IT Projects and Budget - % of IT projects on time and within budget	Yellow		85%	68% 2018, FYQ4	71%	Quarterly	This metric is tracking the percent of IT projects that are completed on time and within budget. Completing IT projects on time and within budget ensures the Department of Treasury meets legal/statutory requirements. A higher current value indicates we are operating more efficiently and effectively and also assists with budget planning and decisions. This data has a lag time of 1 month.
Financial								
ORTA-7	Revenue Estimate - Accuracy - % estimated within actual	Green		3.0%	1.4%	0.3%	CY Annually	The Office of Revenue and Tax Analysis (ORTA) estimates revenues each year to assist with forecasting and financial planning for the State of Michigan. The target of 3% is in reference to estimate revenues within 3% of actuals. Providing accurate revenue estimates impacts the overall state budget process and allows for better budget planning. A lower current value indicates estimates were closer to actuals.
BOI-2	MPSERS Quarterly rolling 1 year average return	Green		7.1%	12.0% 3Q18	13.8%	Quarterly	Actual investment rate of return on pension fund assets for the Michigan Public School Employees' Retirement System vs. Actuarial Target Rate
BOI-4	MPSERS Quarterly rolling 5 year average return	Green		7.1%	10.2% 3Q18	10.1%	Quarterly	Actual investment rate of return on pension fund assets for the Michigan Public School Employees' Retirement System vs. Actuarial Target Rate
BSAF-4(a)	State Credit Rating (Fitch)	Yellow	=	AAA	AA	AA	FY Annually	Ensure the state receives the best credit rating possible. A better credit rating allows the state to borrow money at the most competitive rates available. Ensures the financial position of the state provides a climate for business investment and citizen confidence.
Learning and Growth								
EXEC-1	Improve Internal Communication Through Web	Green	=	100%	100% 2018, August	100%	Monthly	Regularly update the Treasury Intranet home page to ensure staff have access to current information. This measures the percentage of time the web is updated at least monthly.
Good Government								
GG2	The percentage of champions identified in employee survey	Green		56%	54% 2017 Survey	49%	CY Annually	The % of champions identified in the statewide survey of state employees measuring employee engagement. Current value represents 2017 Employee Engagement Results.